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2.12 Screening for Potential Eligibility

2.12.1 Overview

Screening for Potential Eligibility instructions describe how an Intake Consultant handles a call from:

- A person (or someone calling on his/her behalf) who wishes to determine potential eligibility for a public assistance program(s) and/or requests an application for public assistance.
- A person (or someone calling on his/her behalf) who decides not to complete screening but requests an application for assistance.

Gender: When referring to the Client, she/herself was used throughout Volume 4, SSM for simplicity. However, both genders, male and female, may receive benefits.

2.12.2 Processing an Application Request

2.12.2.1 A Person Calls to Apply for Assistance/Agrees to Screen for Potential Eligibility



When a call comes into the Call Center and the Caller selects “Apply for Assistance” from the IVR Main Menu, the agent’s screen displays “Apply for Assistance” as the reason for the call. If the Caller has been authenticated (entered last four digits of SSN and either Case Number or date of birth, and these match an open or previously opened case), the screen displays details regarding the Caller’s case. If the Caller has not been found in the system as the case name or has not entered authenticating information, the reason for the call displays above a Person Search screen.

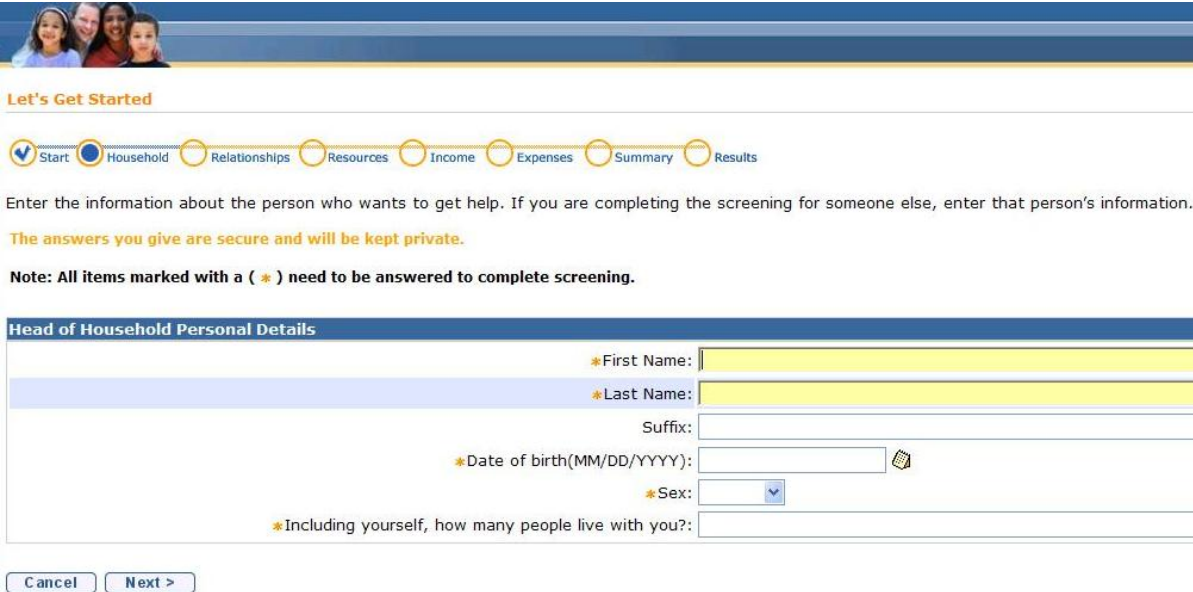
Whether the Caller is known or unknown to the system or is calling for herself or someone else, the agent responds to the Caller’s request to apply, performs screening, and provides application options.

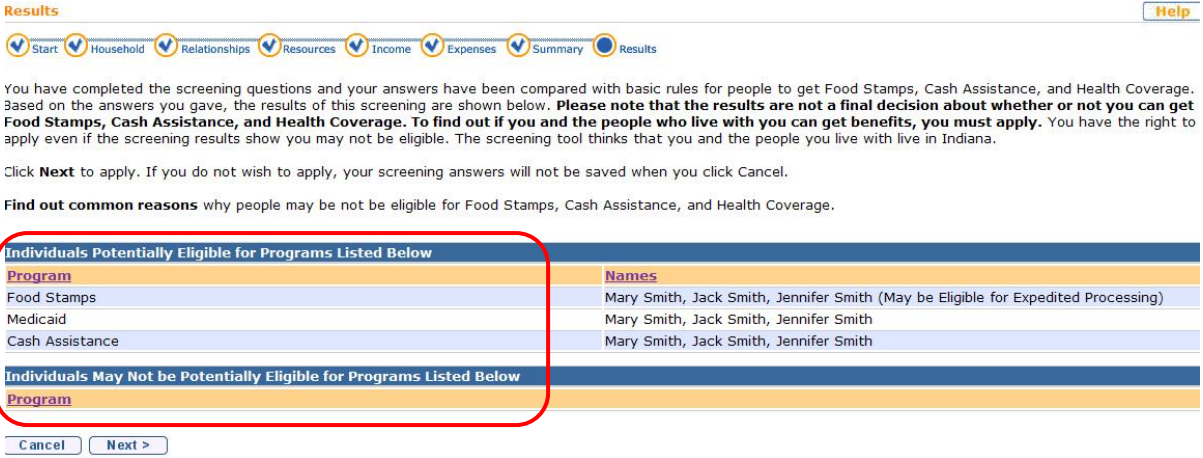
Although the screening process is optional, it provides valuable information on potential eligibility for services. A Caller may decide to apply at any time without completing the screening process.

Step	Person Calls to Apply for Assistance – Agrees to Complete Screening																				
1.	<p>Review the reason for the call (which is displayed) and confirm the reason with the Caller.</p> <p>Case Details for Call Center: SALLY JONES - 3000276521 Help</p> <table><tr><th>Reason For Call</th><th>Reason For Transfer</th><th>Caller Number</th><th>Caller Language</th></tr><tr><td>Apply for Assistance</td><td></td><td>765-668-5579</td><td>English</td></tr></table> <p>Note Text</p> <div></div> <p>Note History</p> <p>Save</p> <p>Options</p> <p>Note: The Note Text box is displayed for you to enter notes on the call, but only when the Caller is known to the system. If the Caller is not known to the system, the Note Text box is not displayed.</p> <p>If the person is calling for a different or another reason, reference scripts for instructions on responding to that type of call. Refer to Section 2.13, Responding to Calls by Type <insert hyperlink>.</p>	Reason For Call	Reason For Transfer	Caller Number	Caller Language	Apply for Assistance		765-668-5579	English												
Reason For Call	Reason For Transfer	Caller Number	Caller Language																		
Apply for Assistance		765-668-5579	English																		
2.	<p>If a Case details page is displayed, ask the Caller's name and SSN to validate whether the correct case is displayed.</p> <p>If a Person Search screen is displayed, ask for sufficient information from the Caller to search for the Caller in the system. Refer to Section 3.11.3, Search Instructions <insert hyperlink>.</p> <p>Note: Do not provide address information to a Caller. If a review of the address is necessary, ask the Caller to provide the address.</p> <p>View any Assistance Groups listed, the Case Status, and Type to determine if the Caller is already receiving benefits.</p> <ul style="list-style-type: none">✓ A Status of 'Open' means the Assistance Group is currently receiving benefits.✓ A Status of 'Pending' usually means the Assistance Group has been asked to provide verification related to processing an application, re-determination, or change, and the verification has not been received.✓ A Status of 'Closed' means the Caller is not currently receiving benefits. <p>Assistance Groups</p> <table><tr><th>Action</th><th>Type</th><th>Authorized Rep</th><th>Individual</th><th>Status</th></tr><tr><td>View</td><td>Food Stamps</td><td></td><td></td><td>Open</td></tr><tr><td>View</td><td>TANF</td><td></td><td></td><td>Pending</td></tr><tr><td>View</td><td>Adult Related Medicaid</td><td></td><td></td><td>Pending</td></tr></table>	Action	Type	Authorized Rep	Individual	Status	View	Food Stamps			Open	View	TANF			Pending	View	Adult Related Medicaid			Pending
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Step	Person Calls to Apply for Assistance – Agrees to Complete Screening
3.	<p>If the Caller confirms the purpose of the call is to apply:</p> <ul style="list-style-type: none"> ✓ Inform the Caller that by answering a few short questions, the Caller can learn of potential eligibility for TANF, Food Stamps, and Health Coverage during the call. ✓ Explain that the questions focus on the people in the home, any income received from a job and/or other sources, rent and utility costs, resources available to the household members, and other information that may relate to the person(s) who is screening for potential eligibility and may be applying for assistance. ✓ Explain to the Caller that the information provided is confidential and that regardless of the results of the screening, the Caller can continue with the process of requesting and submitting an application.
4.	<p>Inform the Caller that the screening questions and the application are also available on the internet, and ask if she has internet access.</p> <p>No internet access: Continue to Step 5.</p> <p>Internet Access: Inform the Caller of the following:</p> <ul style="list-style-type: none"> ✓ The web site (Refer caller to www.in.gov/fssa; instruct to click Apply for Benefits and then select county of residence.) ✓ Explain that the Caller may complete the screening questions at this site and then print the application to mail or fax to the FSSA Document Center for processing or take it to a Help Center/FSSA office, or ✓ After screening (or deciding not to screen), the Caller may submit an on-line application at this site from home or anywhere else she has internet access and mail or fax in the signature page or take it to a Help Center/FSSA office so that we can begin processing, or ✓ Screening can be completed during the current call and an application mailed afterwards to the Caller that includes the information the Caller provides. <p>If the Caller decides to access the screening tool or application on the internet:</p> <ul style="list-style-type: none"> ✓ Repeat the web site address. ✓ Ask the Caller if she has any additional questions, and respond to those questions before concluding the call. ✓ Inform the Caller she can call back at 1-800-403-0864 between the hours of 7 am and 7 pm if she has additional questions. ✓ Go to Step 17. <p>If the Caller decides to continue with screening, continue to Step 5.</p>

Step	Person Calls to Apply for Assistance – Agrees to Complete Screening
5.	<p>Click <i>Home</i> in the upper right corner of the screen to navigate to the User Home page. Click <i>Process Request for Services</i> to navigate to the screening tool.</p> 
6.	<p>Click <i>Start Here</i>.</p> 

Step	Person Calls to Apply for Assistance – Agrees to Complete Screening
7.	<p>Click <i>Screen for Services</i> and move forward to the Let's Get Started screen. Enter the Caller's information and click <i>Next</i>.</p>  <p>Note: if a birth date for a household member is not known, enter 0101 for the month/day/ and for the year, ask the caller to estimate the year and enter that. Inform the caller that if an application is submitted, this information will need to be corrected on the application and provided to us.</p>
8.	<p>Ask the questions presented on each screen, and enter the Caller's response to each question. Accurate entry of information is critical. When you get to the Summary of Household, Resources, Income, and Expenses screen, review all information in each section with the Caller and make any updates needed.</p> <p>Not all questions require a response, and if Caller prefers not to respond to a particular question, continue to the next screening question.</p> <p>Navigate through the screening to the Results screen.</p>
9.	<p>Explain that the screening results are not a final eligibility decision, and inform the Caller that eligibility can officially be determined only if an application is submitted.</p> <p>Inform the Caller that she may file an application for benefits regardless of the screening results.</p>


Step	Person Calls to Apply for Assistance – Agrees to Complete Screening
10.	<p>Review the Results Screen with the Caller.</p> <ul style="list-style-type: none"> ✓ If the Caller is an existing Client, let the Caller know this does not affect the benefits that are currently being received by anyone in the household (unless a change is being reported). ✓ Explain what programs each household member is potentially eligible to receive. ✓ Explain what programs the screening indicates each household member may not be eligible to receive. ✓ If shown as a result, explain potential eligibility for expedited processing for Food Stamps. <p>Note what programs (Assistance Groups) any current Client is already receiving so that Client is not asked if she would like to apply for program she is currently receiving.</p> 
11.	<p>Ask the Caller if she would like to apply for assistance.</p> <ul style="list-style-type: none"> ✓ If the Caller decides to apply but submit the application on-line, provide the confirmation number displayed at the end of the screening for the Caller to access her information, the web site again if needed, and if the screening results do not show potential eligibility for Expedited Food Stamp processing, go to Step 17. ✓ If the Caller decides to apply, but prefers to submit the application on-line and screening results show potential eligibility for Expedited Food Stamp processing, go to Step 12b. ✓ If the Caller decides to apply during the call, click <i>Next</i>. Go to Step 12a. ✓ If the Caller decides not to apply at all, inform the Caller that the information provided during the screening will not be retained. If the Caller confirms the decision not to apply, click <i>Cancel</i> to terminate screening. Ask if you can provide any other assistance. If the Caller does not need any other help, go to Step 17. ✓ If the Caller is potentially eligible for Food Stamps or requests to apply for Food Stamps even if not potentially eligible, explain that you can mail her an application or she can submit an application at a local Help Center the same day, and benefits are determined based on the date the application is received.

Step	Person Calls to Apply for Assistance – Agrees to Complete Screening								
12.	<p>a. If the Caller wants to apply for assistance: Click <i>Next</i>. System navigates to the Apply for Programs screen.</p> <p>If the Caller screened as potentially eligible for a program, it is automatically checked.</p> <p>Ask the Caller what programs she is interested in applying for. If her response is different from what is automatically checked, select the programs she wants to apply for.</p> <p>Apply for Programs</p> <p>The programs already checked are those which one or more people may be able to get, based on the screening results. If you do not click on the box to remove the check mark. If you want to apply for a program that is not checked, click the box next to the program.</p> <p>Please call Indiana Family and Social Services toll free at 1-800-403-0864 between 7 am - 7 pm EST if you have any questions.</p> <p>To apply, click Print Application, Mail Application, or Apply Online. If you do not wish to apply, your screening answers will not be saved when you click Cancel.</p> <p>Please select the programs you would like to apply from:</p> <table border="1"> <thead> <tr> <th data-bbox="277 768 386 793">Programs</th><th></th></tr> </thead> <tbody> <tr> <td data-bbox="277 804 310 829"><input checked="" type="checkbox"/></td><td data-bbox="1057 804 1175 829">Food Stamps</td></tr> <tr> <td data-bbox="277 835 310 861"><input checked="" type="checkbox"/></td><td data-bbox="1057 835 1268 861">Cash Assistance(TANF)</td></tr> <tr> <td data-bbox="277 867 310 892"><input checked="" type="checkbox"/></td><td data-bbox="1057 867 1300 892">Health Coverage(Medicaid)</td></tr> </tbody> </table> <p> <input type="button" value="Cancel"/> <input type="button" value="Mail Application"/> <input type="button" value="Print Application"/> <input type="button" value="Apply Online"/> </p> <p>Click <i>Mail Application</i>.</p> <p>b. If screening results indicate the Caller is potentially eligible for Expedited Food Stamp processing and Client decides to apply for Food Stamps:</p> <ul style="list-style-type: none"> ✓ Explain to the Caller that based on the outcome of the screening, the Caller may be eligible for expedited services. Explain that we can schedule the Caller for the next available appointment in a local office/Help Center, which is usually within two business days. If the Caller has a hardship and asks to complete an application over the phone, explain the process for completing an application on-line or in the mail. Explain that when the signed application is received, an appointment would be scheduled for the telephone interview. If the Caller asks to have the application mailed, go to Step 13. ✓ If the Caller selects the option to go to a local office, copy the Confirmation Number displayed at the top of the Screening Results page; this number will be used when scheduling the appointment in ICES at the closest Help Center to the Caller. Refer to Section 4.10, Scheduling Instructions and Rules Table <insert hyperlink>. 	Programs		<input checked="" type="checkbox"/>	Food Stamps	<input checked="" type="checkbox"/>	Cash Assistance(TANF)	<input checked="" type="checkbox"/>	Health Coverage(Medicaid)
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Step	Person Calls to Apply for Assistance – Agrees to Complete Screening																														
	<p>Results Bob Smith 7000013322</p> <p>Start Household Relationships Resources Income Expenses Summary Results</p> <p>You have completed the screening questions and your answers have been compared with basic rules for people to get Food Stamps, Cash Assist the answers you gave, the results of this screening are shown below. Please note that the results are not a final decision about whether or Cash Assistance, and Health Coverage. To find out if you and the people who live with you can get benefits, you must apply. You have screening results show you may not be eligible. The screening tool thinks that you and the people you live with live in Indiana.</p> <p>Click Next to apply. If you do not wish to apply, your screening answers will not be saved when you click Cancel.</p> <p>Find out common reasons why people may be not be eligible for Food Stamps, Cash Assistance, and Health Coverage.</p> <table border="1"> <thead> <tr> <th colspan="2">Individuals Potentially Eligible for Programs Listed Below</th></tr> <tr> <th>Program</th><th>Names</th></tr> </thead> <tbody> <tr> <td>Food Stamps</td><td>Bob Smith (May be Eligible for Expedited Processing)</td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="2">Individuals May Not be Potentially Eligible for Programs Listed Below</th></tr> <tr> <th>Program</th><th></th></tr> </thead> <tbody> <tr> <td>Medicaid</td><td></td></tr> <tr> <td>Cash Assistance</td><td></td></tr> </tbody> </table> <p>Cancel Next ></p> <ul style="list-style-type: none"> ✓ Provide the Caller with the date, time and location of the interview and ask the Caller to bring any readily available proof of identity, such as a driver's license, photo ID, birth certificate, voter registration card, etc. ✓ After scheduling the appointment, go to Step 17. 	Individuals Potentially Eligible for Programs Listed Below		Program	Names	Food Stamps	Bob Smith (May be Eligible for Expedited Processing)	Individuals May Not be Potentially Eligible for Programs Listed Below		Program		Medicaid		Cash Assistance																	
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13.	<p>The system navigates to the screen for entry of the Caller's mailing address and contact information.</p> <p>If you would like us to mail the application, please enter the following information for the person who is applying. Enter the address where you would like the application to be mailed.</p> <p>Note: All items marked with a (*) need to be answered to complete screening.</p> <table border="1"> <thead> <tr> <th colspan="2">Address to Send Application</th></tr> </thead> <tbody> <tr> <td>* First Name:</td><td>Jack</td></tr> <tr> <td>Middle Initial:</td><td></td></tr> <tr> <td>* Last Name:</td><td>Smith</td></tr> <tr> <td>Home Phone Number:</td><td></td></tr> <tr> <td>Cell Phone Number:</td><td></td></tr> <tr> <td>Work Phone Number:</td><td></td></tr> <tr> <td>Date of Birth(MM/DD/YYYY):</td><td></td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="2">Address</th></tr> </thead> <tbody> <tr> <td>* Address1:</td><td></td></tr> <tr> <td>Address2:</td><td></td></tr> <tr> <td>Apartment:</td><td></td></tr> <tr> <td>* City:</td><td></td></tr> <tr> <td>* State:</td><td>Indiana</td></tr> <tr> <td>* Zipcode:</td><td></td></tr> </tbody> </table> <p>< Back to Previous Cancel Mail Application</p> <p>The First and Last Name fields are pre-populated with information entered during screening. Update the Caller's name if necessary, and enter the Address (required) and Contact Information (optional).</p>	Address to Send Application		* First Name:	Jack	Middle Initial:		* Last Name:	Smith	Home Phone Number:		Cell Phone Number:		Work Phone Number:		Date of Birth(MM/DD/YYYY):		Address		* Address1:		Address2:		Apartment:		* City:		* State:	Indiana	* Zipcode:	
Address to Send Application																															
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Step	Person Calls to Apply for Assistance – Agrees to Complete Screening
14.	<p>Review the information with the Caller for accuracy. Click <i>Mail Application</i> at the bottom of the screen.</p> <p>Confirmation to Mail Application</p> <hr/> <p>Please remember the Confirmation number for further communication or questions or to track your application with Indiana Family and Social Services. This Application will be mailed to the name and address you entered. When you receive it, please review and update the information necessary, sign it, and return it by mail or fax to the Indiana Family and Social Services Administration.</p> <p>Confirmation Number: 7000301636</p> <p>FSSA Document Center PO Box 1810 Marion, Indiana 46952</p> <p>Phone & Fax 1-800-403-0864</p> <p>Please call Indiana Family and Social Services toll free at 1-800-403-0864 between 7 am - 7 pm EST if you have any questions. Please click on Finish Button to print the application.</p> <p>Finish</p>
15.	<p>Provide the Caller with the confirmation number that appears on the screen and ask the Caller to write it down in case she has questions or wishes to track the application.</p>
16.	<p>Explain the application will be printed and mailed the next business day.</p> <ul style="list-style-type: none"> ✓ Remind the Caller to review the application, complete or correct information and sign and return the application, with any requested verifications, to the address or fax number on the instructions that will be sent with the application. Explain that the application can be signed and returned separately from the verifications and that the date the signed application is received is important because it determines the benefit start date if found eligible. ✓ Explain that the application packet will include instructions that should be read and followed, and that if the Caller has questions, she should call back during business hours, 7 am-7 pm, Monday thru Friday. ✓ Remind the Caller that the application processing begins when an application is returned to us and contains at least the applicant's name, address, signature and the program(s) she is applying for. ✓ If the Caller requests to apply for Food Stamps whether or not she is potentially eligible, explain her options to apply - by mail, fax, internet, or at a local Help Center the same day (or next business day if call is received after Help Center business hours), and that benefits are determined based on the date the application is received. ✓ Inform the Caller that once the application is returned to us, we will send a letter notifying her of any required interview, the date and time of the interview, the type of interview (telephone or in-office); what additional information or verifications may be required to complete application processing, and when any requested information is due.
17.	<p>Wrap-up the call, making sure to thank the person for calling the Indiana Family and Social Services Administration.</p> <p>Note: When the Caller disconnects, the next call is automatically routed to you and the information on the screen is replaced by information related to the next call.</p>

2.12.2.2 A Person Calls to Apply for Assistance – Decides Not to Screen

Step	Person Calls to Apply for Assistance – Decides Not to Screen
1.	“Apply for Assistance” is displayed in the Screen Header as the Reason for the Call.
2.	<p>After confirming the reason for the call (Steps 1-3 in Section 2.12.2.1, A Person Calls to Apply for Assistance/Agrees to Screen for Potential Eligibility <insert hyperlink>), the Caller decides not to complete the screening process during the call but requests an application be mailed. Explain that you need to obtain the Caller’s name and address so that the requested application can be mailed.</p> <p>Attempt to gather names and dates of birth of each household member and their relationships to each other in the screening tool, bypassing all other information to get to the screen where you can mail the application. Explain to the Caller that this information will be included on the application that you mail to her.</p> <p>If Caller is unwilling to provide the names, dates of birth and relationships of each household member, click <i>Apply Now</i> from the User Home page.</p> 

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3.	<p>Since the Caller did not screen for potential eligibility, none of the programs are prechecked. Ask the Caller which programs she would like to apply for and check the appropriate box(es).</p> <p>Apply for Programs</p> <p>The programs already checked are those which one or more people may be able to get, based on the screening results. If you do not click on the box to remove the check mark. If you want to apply for a program that is not checked, click the box next to the program.</p> <p>Please call Indiana Family and Social Services toll free at 1-800-403-0864 between 7 am - 7 pm EST if you have any questions.</p> <p>To apply, click Print Application, Mail Application, or Apply Online. If you do not wish to apply, your screening answers will not be saved when you click Cancel.</p> <p>Please select the programs you would like to apply from:</p> <table border="1"> <thead> <tr> <th data-bbox="326 667 431 690">Programs</th><th></th></tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td><td>Food Stamps</td></tr> <tr> <td><input checked="" type="checkbox"/></td><td>Cash Assistance(TANF)</td></tr> <tr> <td><input checked="" type="checkbox"/></td><td>Health Coverage(Medicaid)</td></tr> </tbody> </table> <p> <input type="button" value="Cancel"/> <input type="button" value="Mail Application"/> <input type="button" value="Print Application"/> <input type="button" value="Apply Online"/> </p> <p>Click <i>Mail Application</i>.</p>	Programs		<input checked="" type="checkbox"/>	Food Stamps	<input checked="" type="checkbox"/>	Cash Assistance(TANF)	<input checked="" type="checkbox"/>	Health Coverage(Medicaid)																		
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5.	<p>Review the information with the Caller for accuracy. Click <i>Mail Application</i> at the bottom of the screen.</p> <p>Confirmation to Mail Application</p> <hr/> <p>Please remember the Confirmation number for further communication or questions or to track your application with Indiana Family and Social Services This Application will be mailed to the name and address you entered. When you receive it, please review and update the information necessary, sign it, and return it by mail or fax to the Indiana Family and Social Services Administration</p> <p>Confirmation Number: 7000301636</p> <p>FSSA Document Center PO Box 1810 Marion, Indiana 46952</p> <p>Phone & Fax 1-800-403-0864</p> <p>Please call Indiana Family and Social Services toll free at 1-800-403-0864 between 7 am - 7 pm EST if you have any questions. Please click on Finish Button to print the application</p> <p><input type="button" value="Finish"/></p>
6.	<p>Provide the Caller with the confirmation number that appears on the screen and ask the Caller to write it down in case she has questions or wishes to track the application she has asked be mailed.</p>
7.	<ul style="list-style-type: none"> ✓ Explain to the Caller that the application will be printed and mailed the next business day. ✓ Remind the Caller to review the application, complete or correct information and sign and return the application, with any requested verifications, to the address or fax number shown on the application instructions or to a local Help Center. ✓ Explain the application packet will include instructions that should be read and followed, and that if she has questions, she should call back during business hours, 7 am to 7 pm Monday thru Friday. ✓ Remind the Caller that application processing begins when an application is returned to us and contains at least her name, address, signature and the program(s) she is applying for. ✓ If the Caller requests to apply for Food Stamps, explain her options to apply – by mail, fax, internet or at a local Help Center the same day (or next business day if call is received after Help Center business hours), and that benefits are determined based on the date the application is received. ✓ Inform the Caller that once the application is returned to us, we will send a letter notifying her of any required interview, the date and time of the interview, the type of interview (telephone or in-office); what additional information or verifications may be required to complete application processing, and when any requested information is due.
8.	<p>Wrap-up the call, making sure to thank the person for calling the Indiana Family and Social Services Administration.</p> <p>Note: When the Caller disconnects, the next call is automatically routed and the information on the screen is replaced by information related to the next call.</p>